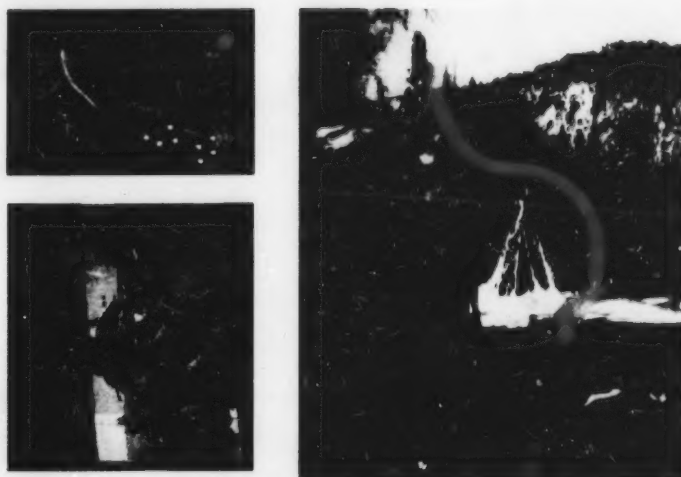

Demand for Aboriginal Culture Products in Key European Markets 2000



**ABORIGINAL
TOURISM
TEAM
CANADA**

**CANADIAN
TOURISM
COMMISSION**



**COMMISSION
CANADIENNE
DU TOURISME**

***Demand for Aboriginal Culture Products
in Key European Markets***

Prepared for:
***Aboriginal Tourism Team Canada
and Canadian Tourism Commission***

Prepared by:
PRICEWATERHOUSECOOPERS 

Canadian Cataloguing in Publication Data

Main entry under title:
Demand for Aboriginal culture products in key
European markets

Issued also in French under title: Demande de produits culturels
autochtones sur les marchés européens clés.

ISBN 0-662-29345-2
Cat. No. C86-111/2000E

1. Tourism -- Canada
2. Native business enterprises -- Canada
- I. Travelers - Europe
- II. Canadian Tourism Commission

G155.C3D45 2000 338.4'79104648 C00-980394-7

*This research and resulting report
were a joint project of the
Canadian Tourism Commission (CTC and
Aboriginal Tourism Team Canada (ATTC)*

*ATTC wishes to thank
Aboriginal Business Canada for their support*

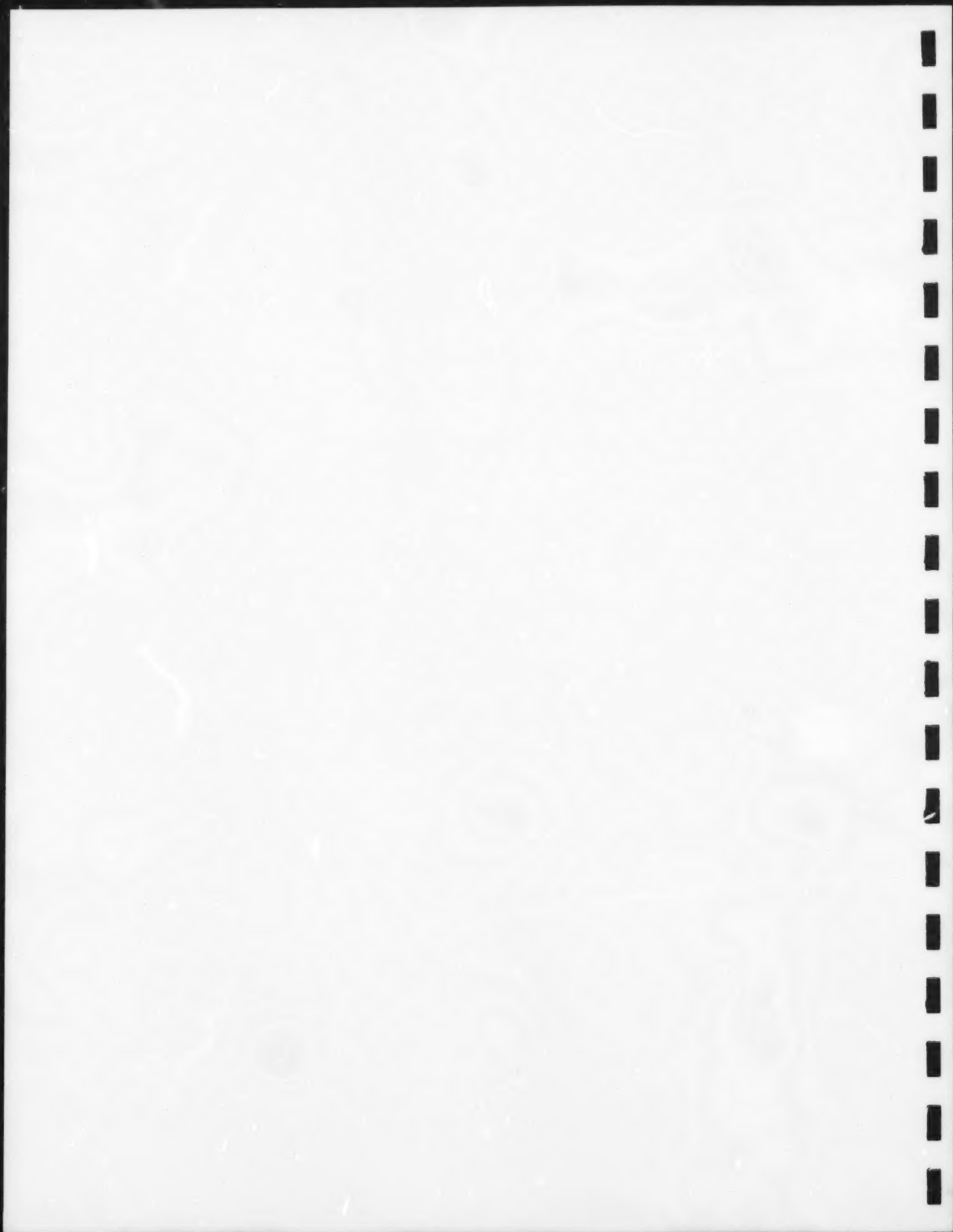
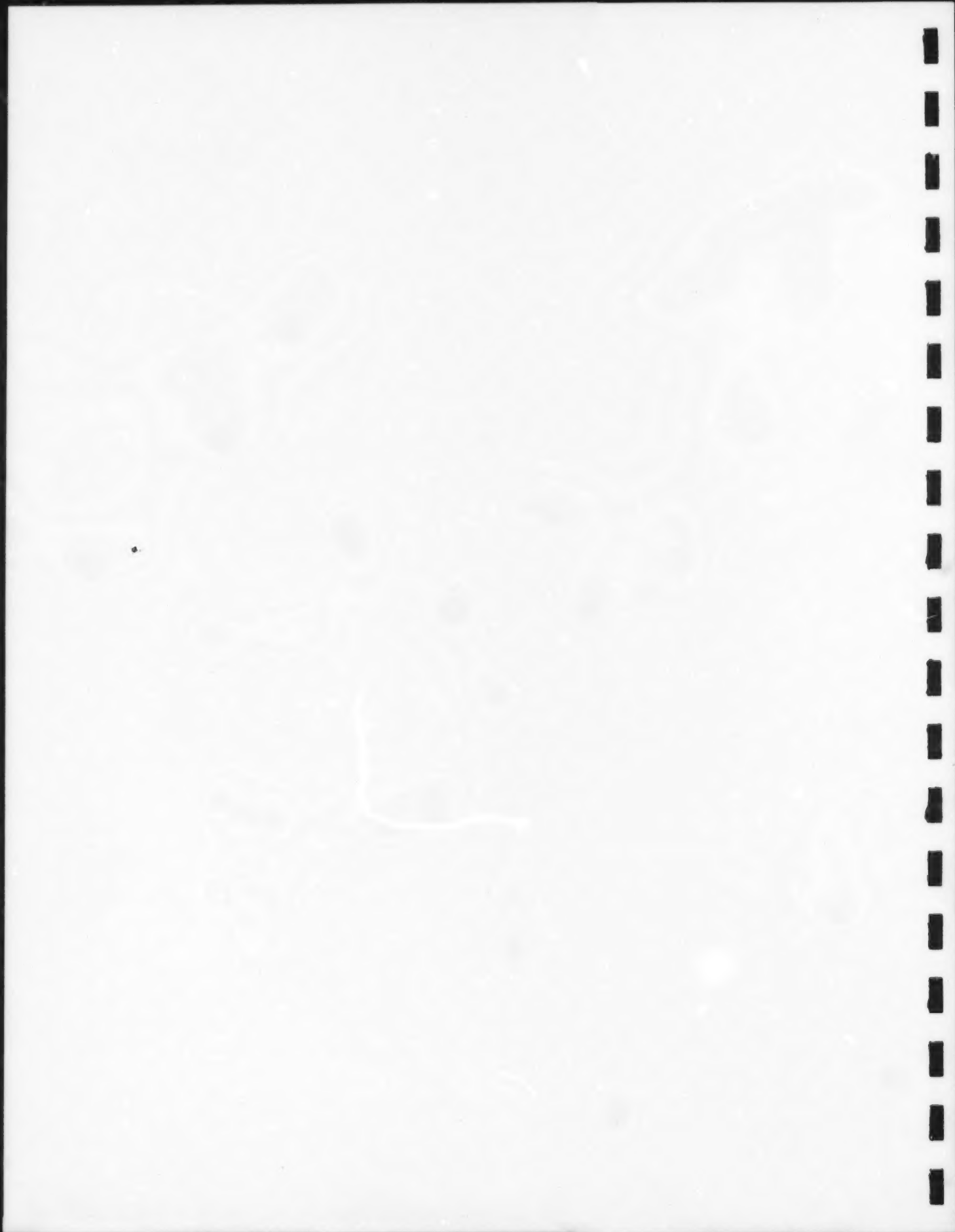


Table of Contents

STUDY OVERVIEW.....	1
PRIMARY MARKETS – COMPARATIVE PROFILE OF ABORIGINAL CULTURE TRAVELLERS	3
PRIMARY MARKETS – DEFINING CHARACTERISTICS OF ABORIGINAL CULTURE TRAVELLERS	29
SECONDARY MARKETS – SIZE OF THE ABORIGINAL CULTURE TRAVEL MARKET	41
SECONDARY MARKETS – SOCIO-DEMOGRAPHIC CHARACTERISTICS	45
THE ABORIGINAL CULTURE MARKET – POTENTIAL FOR CANADA	51



STUDY OVERVIEW

Purpose and Objectives

The purpose of this study is to examine the demand for Canada's Aboriginal Culture products in key European markets.

This assignment has two main focuses:

- conducting a reanalysis of existing consumer studies in three primary European markets (the United Kingdom, Germany and France) to determine the level of demand for, awareness of and perceptions of Canada's Aboriginal Culture products and to profile the characteristics of Aboriginal Culture travellers; and
- collecting data through Omnibus surveys for three secondary European markets (the Netherlands, Italy and Switzerland) to look at the demand, market size and potential for Canada's Aboriginal Culture Products.

Methodology

The Aboriginal Culture market is defined as travellers who "saw or experienced unique aboriginal or native groups" on their most recent (long-haul) trip.

A long-haul trip, for the purpose of this study, is a holiday trip taken by plane, to somewhere outside of Europe and the Mediterranean for four nights or longer.

There are three separate components to this study:

- A comparative profile of the Aboriginal Culture segment in each *primary* market;
- Multi-variate modelling (discriminant analysis) of the data from each *primary* market to determine the key actionable factors that contribute to an interest in Aboriginal Culture products; and
- Omnibus surveys in each of the three *secondary* markets to determine the size of the overall Aboriginal Culture travel market and the size of the market for Canada in each country.

PRIMARY MARKETS – COMPARATIVE PROFILE OF ABORIGINAL CULTURE TRAVELLERS

Overall Size of the Long-Haul Pleasure Travel Market for the Primary European Markets

The size of the long-haul pleasure travel markets for Germany and the U.K. were defined as part of the 1995/96 Pleasure Travel Market Studies for these countries. Similarly, the potential market for France was calculated as part of the 1998 France Strategic Segmentation Study.

The table below shows the approximate size of the adult population, the incidence of long-haul pleasure travel and the size of the potential adult long-haul pleasure travel market for the three primary European markets.

Germany has the largest potential market (18.1 million travellers), followed by the U.K. (13.5 million travellers) and then France (9.1 million travellers).

	U.K.	Germany	France
Approximate Adult Population (18 years or older)			
# of people (000s)	46,007	65,498	44,848
Incidence of Long-Haul Pleasure Travellers			
Taken a trip in the past two years or planning to in the next two years	29.4%	27.6%	20.4%
Potential Adult Long-Haul Pleasure Travellers			
# of travellers (000s)	13,526	18,077	9,149

Overall Demand for Aboriginal Culture Products for the Primary European Markets

The table below shows the overall demand for Aboriginal Culture products in the primary European markets including the percentage who participated in Aboriginal Culture activities on their most recent long-haul pleasure trip, and the percentage who are motivated by Aboriginal Culture in destination selection.

German long-haul pleasure travellers were the most likely to have participated in Aboriginal Culture activities on their most recent trip (50%) and are also the most likely to be motivated by Aboriginal Culture in selecting a vacation destination (70%), compared to their counterparts in the U.K. and France.

Demand for Aboriginal Culture Products in Key European Markets

	U.K.	Germany	France
Participated in Aboriginal Culture Activities			
% participated in on most recent trip	30%	50%	16%
Motivated by Aboriginal Culture in destination selection			
% always + often important	52%	70%	62%

Potential Aboriginal Culture Travellers to Canada for the Primary European Markets

- An overview of the demand for Aboriginal Culture products is presented below, including the size of the potential Aboriginal Culture market, interest in visiting Canada among Aboriginal Culture travellers in each country in the next 5 years, the size of the potential market to Canada and the estimated revenue potential for Canada.
- All three primary markets represent a significant opportunity for Canada's Aboriginal Culture product. The greatest potential is in the U.K. and German markets. However, the lower interest in Canada in Germany suggests the need to create interest in Canada's Aboriginal Culture products in this market.

	U.K. (1996)	Germany (1996)	France (1998)
Size of the Potential Aboriginal Culture Market			
(000s)	4,058	9,039	1,464
Interest in Visiting Canada (5 years)			
(very + somewhat interested)	67%	28%	56%
Potential Aboriginal Culture Travellers to Canada			
(000s)	2,719	2,531	820
Potential Expenditures			
(millions of CDN\$)	\$3,696	\$6,135	\$850

Key Trip Characteristics for Aboriginal Culture Travellers (Most Recent Long-Haul Trip)

The key characteristics of Aboriginal Culture travellers are summarized for each of the primary markets on the next page. The key findings for each market are as follows:

United Kingdom

- Although most U.K. Aboriginal Culture travellers travelled for pleasure or vacation on their most recent trip (57%), these travellers were more likely to engage in VFR travel than their German and French counterparts (27%).
- This bodes well for Canada, given that 38% have close friends or relatives living in Canada.
- Compared to their equivalents in Germany and France, these travellers were less likely to have used a package (37%) and took longer trips.

Germany

- The main purpose for taking a trip among German Aboriginal Culture travellers was for pleasure or vacation (70%).
- Compared to their U.K. and French counterparts, German Aboriginal Culture travellers had the highest total trip expenditures (CDN\$8,000) and their per person per day trip expenditures were almost double those for the U.K. and France (CDN\$120).
- Almost half of these travellers used a package on their most recent trip (48%).

France

- French Aboriginal Culture travellers were more likely than their U.K. and German counterparts to have visited Canada on their most recent trip (16%), with Canada ranked 3rd among destinations visited.
- Seventy-one percent (71%) travelled for pleasure. They are the most likely to prefer to travel with friends (22%).
- Just over half of French Aboriginal Culture travellers used a package on their most recent trip.

Demand for Aboriginal Culture Products in Key European Markets

	U.K.	Germany	France
Destination of Most Recent Trip			
Ranking for Canada	8 th	10 th	3 rd
% visited Canada on most recent trip	5%	3%	16%
Main Purpose of Trip			
Pleasure or vacation	57%	70%	71%
VFR	27%	17%	15%
Combined business / pleasure	9%	6%	11%
Travel Party Composition			
Travelled with spouse / partner	57%	50%	48%
Travelled alone	22%	30%	27%
Travelled with child(ren)	13%	7%	7%
Travelled with friends	10%	11%	22%
Trip Expenditures			
Total (per party)	CDN\$6,700	CDN\$8,000	CDN\$4,600
Total (per person / day)	CDN\$69	CDN\$120	CDN\$64
Other Trip Characteristics			
Average trip duration	30 nights	26 nights	22 nights
Average travel party size	2.4 persons	3.5 persons	2.3 persons
Used a package	37%	48%	52%

Trip Planning Preferences of Aboriginal Culture Travellers

Trip planning preferences of Aboriginal Culture travellers are summarized on the next page. Key results for each market are:

United Kingdom

- U.K. Aboriginal Culture travellers have the longest trip planning horizon among the three primary markets, deciding to go on their trip 6.5 months in advance and booking their trip 3.8 months in advance.
- These travellers are more likely to seek the advice of friends and family members in planning their trip (60%), which is not surprising given their higher tendency towards VFR travel.

Germany

- German Aboriginal Culture travellers have the shortest trip planning horizons, deciding to go 5.7 months in advance and booking only 2.7 months in advance.
- These travellers tend to rely on travel agents (69%) and printed materials in their trip planning, using brochures / pamphlets (54%) and visiting the library (17%).

France

- French Aboriginal Culture travellers book their trips 3.2 months in advance, on average, and are more likely to rely on the advice of their business colleagues (13%) when planning their trip.

Demand for Aboriginal Culture Products in Key European Markets

	U.K.	Germany	France
Time Before Deciding to Go on Most Recent Trip			
(average)	6.5 months	5.7 months	n/a
Time Before Booking Most Recent Trip			
(average)	3.8 months	2.7 months	3.2 months
Sources of Information Used for Trip Planning (all mentions)			
• Talked to friends / family members	60%	52%	41%
• Talked to a travel agent	57%	69%	54%
• Picked up brochures / pamphlets	40%	54%	31%
• Tour operator / company	19%	20%	7%
• Travel programs	15%	8%	2%
• Read articles in newspapers / magazines	14%	8%	14%
• Books / went to the library	13%	17%	6%
• Airline	13%	9%	13%
• On-line services *	4%	1%	21%
• Talked to business colleagues	2%	3%	13%

* Although the use of on-line services appears higher in the French market (21%), the use of the Internet in the U.K. and Germany has no doubt increased since these studies were conducted (1995/96).

General Travel Motivations for Aboriginal Culture Travellers

The top 10 general travel motivations are presented on the next page. Looking at the primary markets, there are several key motivations for destination selection that are common among Aboriginal Culture travellers in these three markets, including:

- Variety of things to see and do;
- Interesting and friendly local people;
- Outstanding scenery;
- Opportunities to increase one's knowledge; and
- Nice weather.

United Kingdom

- The top rated motivation for destination selection among U.K. Aboriginal Culture travellers was having a variety of things to see and do on their trip (90%).
- These travellers were more likely than their German and French counterparts to seek destinations that offer interesting small towns and villages (79%) and inexpensive travel, both within (80%) and to (79%) the destination country.

Germany

- The top rated motivation for destination selection among German Aboriginal Culture travellers was meeting interesting and friendly local people (92%).
- These travellers were more likely than their U.K. and French counterparts to consider environmental quality of the area (88%) and the availability of pre-trip tourist information (83%).

France

- The top rated motivation for destination selection among French Aboriginal Culture travellers was to see or experience people from different ethnic backgrounds (96%).
- These travellers are looking to experience a different culture (93%) when selecting a vacation destination and want to take in local activities, including tasting local cuisine (92%) and seeing local crafts and handiwork (91%).
- French Aboriginal Culture travellers are also looking for advertised low cost excursions when selecting a destination (91%).

Demand for Aboriginal Culture Products in Key European Markets

U.K.	Germany	France
• Variety of things to see and do (90%) • Interesting and friendly local people (89%) • Outstanding scenery (86%) • Destinations that provide value for my holiday money (86%) • Opportunities to increase one's knowledge (86%) • Personal safety, even when travelling alone (85%) • Nice weather (84%) • Local cuisine / new foods (80%) • Inexpensive travel within the country (80%) • Interesting small towns and villages (79%) • Inexpensive travel to the country (79%)	• Interesting and friendly local people (92%) • Outstanding scenery (91%) • Opportunities to increase one's knowledge (89%) • Environmental quality of area (88%) • Variety of things to see and do (88%) • Nice weather (87%) • Personal safety (86%) • Destinations that provide value for my holiday money (86%) • Availability of pre-trip tourist info (83%) • Unique or different aboriginal or indigenous peoples (82%)	• See or experience people from different ethnic backgrounds (96%) • Nice weather (84%) • Interesting and friendly local people (95%) • Outstanding scenery (94%) • Experiencing a different culture (93%) • Local cuisine / new foods (92%) • Local crafts and handiwork (91%) • Advertised low cost excursions (91%) • Increase one's knowledge (91%) • See or experience unique aboriginal or native groups (90%) • Variety of things to see and do (90%)

Activities Participated In By Aboriginal Culture Travellers (Most Recent Trip)

As re-iterated on the next page, the defining characteristic for the Aboriginal Culture market in each primary market was having "seen or experienced unique aboriginal or native groups" on their most recent long-haul trip.

Not surprisingly, Aboriginal Culture travellers in the three primary markets were all likely to have participated in other cultural experiences, such as:

- Sampling local foods;
- Getting to know local people; and
- Seeing local crafts and handiwork.

Other common activities participated in across the three primary markets, include:

- Shopping;
- Informal or casual dining with table service; and
- Taking pictures or filming (*not asked in France).

U K	Germany	France
Defining Activities		
• See unique or different native groups (100%)	• See or experience unique native groups (100%)	• Seeing unique aboriginal or native groups (100%)
Other Activities Participated In		
• Sampling local foods (96%) • Shopping (90%) • Informal or casual dining with table service (88%) • Taking pictures / filming (88%) • Visiting small towns and villages (86%) • Getting to know local people (85%) • Local crafts and handiwork (83%) • Visiting scenic landmarks (81%) • Visiting national parks or forests (79%) • Sightseeing in cities (79%)	• Sampling local foods (92%) • Getting to know local people (87%) • Taking pictures or filming (86%) • Shopping (85%) • Local crafts and handiwork (78%) • Enjoying ethnic culture and events (75%) • Visits to appreciate natural ecological sites (75%) • Swimming (73%) • Informal or casual dining with table service (72%) • Observing wildlife / bird watching (66%)	• Sampling local foods (92%) • Getting to know local people (88%) • Seeing local crafts and handiwork (87%) • Visiting small towns and villages (85%) • Sightseeing in cities (81%) • Seeing people from different ethnic backgrounds (75%) • Enjoying ethnic culture / events (75%) • Shopping (73%) • Informal or casual dining with table service (68%) • Walking tours (67%) • Visiting scenic landmarks (67%)

Key results for each market are:

United Kingdom

- U.K. Aboriginal Culture travellers sought sightseeing related activities on their most recent trip, including visiting small towns and villages (86%), visiting scenic landmarks (81%), visiting national parks and forests (79%) and sightseeing in cities (79%).

Germany

- German Aboriginal Culture travellers were more likely than their U.K. and French counterparts to visit natural ecological sites (75%), go swimming (73%) and observe wildlife / bird watching (66%).

France

- Like their equivalents in the U.K., French Aboriginal Culture travellers partook in sightseeing opportunities on their most recent trip including visiting small towns and villages (85%), sightseeing in cities (81%), taking walking tours (67%) and visiting scenic landmarks (67%).
- Aboriginal Culture travellers in France were more likely to have seen or experienced people from different ethnic backgrounds (75%).

Socio-Demographic Characteristics of Aboriginal Culture Travellers

The socio-demographic characteristics of Aboriginal Culture travellers are summarized on the next two pages. Key findings are presented below:

United Kingdom

- Aboriginal Culture travellers from the U.K. are, on average, 44 years of age, and are more likely to be male (57%) than female (43%).
- These travellers are also more likely to be married (54%) than single (27%), and about a fifth have children under 18 living at home (19%).
- Approximately one third have a college or university degree (32%), and 42% have household incomes of CDN\$52,000 or more.
- It is also important to note that 38% of U.K. Aboriginal Culture travellers have friends and relatives living in Canada.

Germany

- The average age of German Aboriginal Culture travellers is 43. Just over 40% are married with about a fifth having children under 18 still living at home.
- Compared to U.K. and French Aboriginal Culture travellers, these travellers are more likely to be female (53%). They also tend to be less educated (only 20% have a post-secondary degree).
- Very few of these travellers have friends or relatives living in Canada (5%). This is a possible reason for the low interest in visiting Canada.

France

- Aboriginal Culture travellers from the France are, on average, 45 years of age.
- Compared to their U.K. and German counterparts, they are the most likely segment to have children under 18 living at home (25%).
- These travellers are also more likely to have obtained a college or university degree (39%) and have higher annual household incomes (52% have incomes of CDN\$47,000 or more).
- Almost a fifth (18%) of these travellers have friends or relatives living in Canada.

Demand for Aboriginal Culture Products in Key European Markets

	U.K.	Germany	France
Gender			
• Male	57%	47%	61%
• Female	43%	53%	39%
Age			
• Average Age	44	43	45
Marital Status			
• Married	54%	41%	43%
• Single	27%	35%	32%
• Divorced / separated / widowed	13%	11%	14%
• Living together	6%	12%	10%
Have Children Under 18 in Household			
• Yes	19%	20%	25%
Highest Level of Education Completed			
• College or University degree	32%	20%	39%
Proficiency in English (Very + Quite Well)			
• Speaking	n/a	67%	44%
• Reading	n/a	18%	47%
Close Friends or Relatives Living in Canada			
• Yes	38%	5%	18%
Occupation			
• White-collar worker	32%	31%	34%
• Blue-collar worker	13%	7%	5%
• Administrator / Manager	12%	6%	15%
• Self-employed / Freelancer	13%	13%	13%
• University / College Student	7%	12%	17%
• Non-Working housewife / unemployed / retired	15%	20%	27%
Average Annual Household Income			
• CDN\$50,000 or more	42%	39%	52%
(Approximate)	(CDN\$52,130)	(CDN\$49,901)	(CDN\$47,119)

Region of Origin

U.K.	Percent
• North West	7%
• Scotland	12%
• West Midlands	10%
• East Midlands	5%
• Wales	2%
• Yorkshire / Humberside	11%
• North East	3%
• Greater London	14%
• South East	22%
• South West	8%
• East Anglia	6%

Germany	Percent
• Schleswig-Holstein / Hamburg / Bremen / Lower Saxony	22%
• North Rhine	17%
• Hesse / Rhineland / Saarland	14%
• Baden-Wurtemberg	11%
• Bavaria	14%
• Berlin	5%
• Mecklenburg-Western Pomerania / Braunschweig / Saxony-Anhalt	8%
• Thuringia / Saxony	10%

Demand for Aboriginal Culture Products in Key European Markets

France	Percent
• Paris	30%
• Paris Basin	17%
• West	19%
• North	10%
• East	5%
• Centre-East	4%
• South-West	8%
• Mediterranean	7%

Media Preferences of Aboriginal Culture Travellers

A summary of Aboriginal Culture travellers' media preferences by primary market is shown starting on page 19. Key results are as follows:

United Kingdom

- Popular newspapers read by U.K. Aboriginal Culture travellers include the Daily Mail (20%) and the Sunday Times (19%).
- Almost 40% of these travellers do not read magazines or periodicals on a regular basis (38%), so this may not be the most effective medium with which to reach them.
- Almost all U.K. Aboriginal Culture travellers watch television (98%), with BBC 1 (92%), ITV (72%) and BBC 2 (59%) being popular television stations watched.
- BBC Radio 4 is the most popular radio station listened to (31%)

Germany

- The top newspaper read regularly by German Aboriginal Culture travellers is Bild (14%), followed closely by Suddeutsche Zeitung (13%).
- Spiegel is the most popular magazine read regularly (19%), followed by Stern (17%) and Focus (15%).
- Over half of German Aboriginal Culture travellers watch ARD (56%), ZDF (54%) or RTL (52%) television stations.
- NDR is the most popular radio station listened to (17%).

France

- Le Monde is the most popular newspaper read by French Aboriginal Culture Travellers (22%).
- Le Nouvel Observateur is the most popular magazine read regularly (19%), followed by L'express (15%) and VSD (15%).
- Popular television stations watched by almost half of French Aboriginal Culture travellers include TF1 (48%), France 2 (47%) and France 3 (45%).
- France Inter is the most popular radio station listened to (18%)

Demand for Aboriginal Culture Products in Key European Markets

U.K.	Germany	France
Daily Newspapers Read		
• Daily Mail (20%) • The Sunday Times (19%) • The Daily Telegraph (16%) • The Guardian (14%) • The Sun (13%) • The Mail on Sunday (13%) • The Times (12%)	• Bild (14%) • Suddeutsche Zeitung (13%) • Frankfurter Allgemeine Zeitung (11%) • Bild am Sonntag (10%) • Handelsblatt (8%)	• Le Monde (22%) • Ouest France (13%) • Liberation (11%) • L'Equipe (11%) • Le Figaro (10%)
<i>Do not read any daily newspapers (15%)</i>	<i>Do not read any daily newspapers (12%)</i>	<i>Do not read any daily newspapers (23%)</i>
Magazines / Periodicals Read Regularly		
• Woman's magazines (14%) • Specialist magazines (14%) • General interest magazines (13%) • Hobby magazines (11%) • Home / Garden magazines (8%)	• Spiegel (19%) • Stern (17%) • Focus (15%) • Geo (12%) • Brigitte (10%)	• Le Nouvel Observateur (19%) • L'express (15%) • VSD (15%) • Paris Match (10%) • L'Evénement du Jeudi (9%)
<i>Do not read magazines or periodicals (38%)</i>	<i>Do not read magazines or periodicals (20%)</i>	<i>Do not read magazines or periodicals (21%)</i>
Television Stations Watched		
• BBC 1 (92%) • ITV (72%) • BBC 2 (59%) • Channel 4 (49%)	• ARD (56%) • ZDF (54%) • RTL (52%) • SAT 1 (42%) • PRO 7 (30%)	• TF1 (48%) • France 2 (47%) • France 3 (45%) • La Cinquième / Arte (35%) • M6 (31%) • Canal + (31%)
<i>Do not watch television (2%)</i>	<i>Do not watch television (n/a)</i>	<i>Do not watch television (9%)</i>
Types of Programs Watched (Top 3 Mentions)		
• News (58%) • Drama (45%) • Sports (34%) • Educational/cultural shows (34%) • Soap operas (27%) • Talk shows (10%) • Situational comedies (9%) • Children's shows (7%)	• News (78%) • Movies (68%) • Sports (31%) • Talk shows (30%) • Educational/cultural shows (30%) • Drama (24%) • Situational comedies (11%) • Game shows (9%)	• News (82%) • Movies (76%) • Educational / cultural shows (45%) • Sports (35%) • Soap operas (9%) • Talk shows (8%) • Music television (12%) • Drama (5%)

Demand for Aboriginal Culture Products in Key European Markets

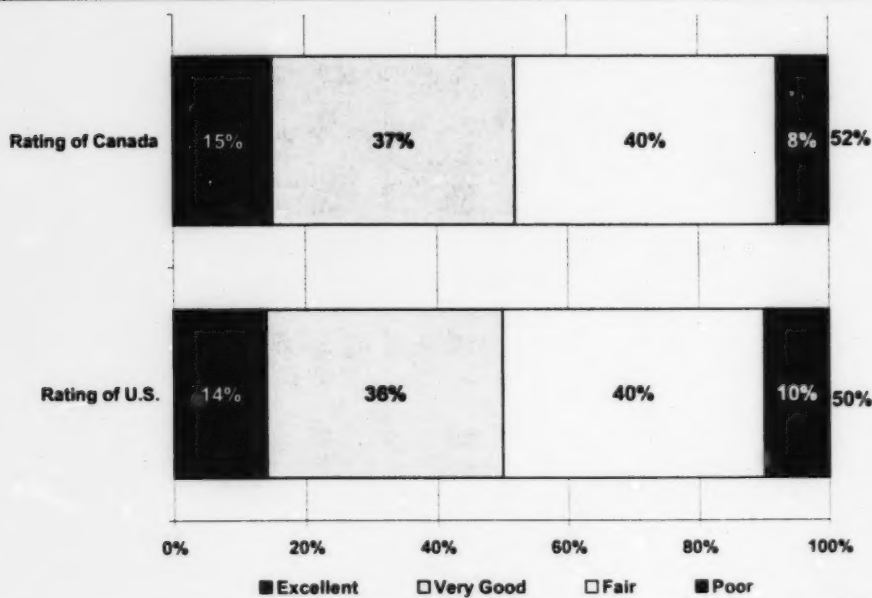
U.K.	Germany	France
• Game shows (5%) • Music television (4%) • Commercials (3%)	• Soap operas (8%) • Music television (6%)	• Situational comedies (5%) • Game shows (3%)
Radio Station Listened to Most Often		
• BBC Radio 4 (31%) • Commercial Local Radio (25%) • BBC Radio 1 (23%) • Classic FM (15%) • BBC Radio 2 (14%) • Capital Radio (10%) • BBC Radio 5 Live (9%) • Virgin Radio (8%) • BBC Local Radio (7%) • BBC Radio 3 (5%)	• NDR (17%) • WDR (13%) • SWF (11%) • BR (10%) • Radio Hamburg (10%) • Radio NRW (8%) • RSH (6%) • Antenne Bayern (6%) • FFH (5%)	• France Inter (18%) • RTL (15%) • France Info (14%) • NRJ (13%) • Chérie FM (11%) • RFM (11%) • Europe 2 (9%) • Europe 1 (8%) • France Culture (6%) • Radio locales (5%) • Nostalgie (5%)
<i>Do not listen to radio (10%)</i>	<i>Do not listen to radio (7%)</i>	<i>Do not listen to radio (14%)</i>

Impression Ratings of the Aboriginal Culture Product Among U.K. Consumers

In the 1995/96 Pleasure Travel Markets to North America Series, all respondents were asked to rate a series of attributes in terms of product potential for both Canada and the U.S.

The exhibit below shows that over half (52%) of long-haul U.K. pleasure travellers rated "unique or different aboriginal or indigenous peoples" in Canada as excellent or very good (15% + 37%).

These travellers rated the aboriginal product in the U.S. almost identically with 14% having rated it as excellent and 36% as very good, for a total of 50%.



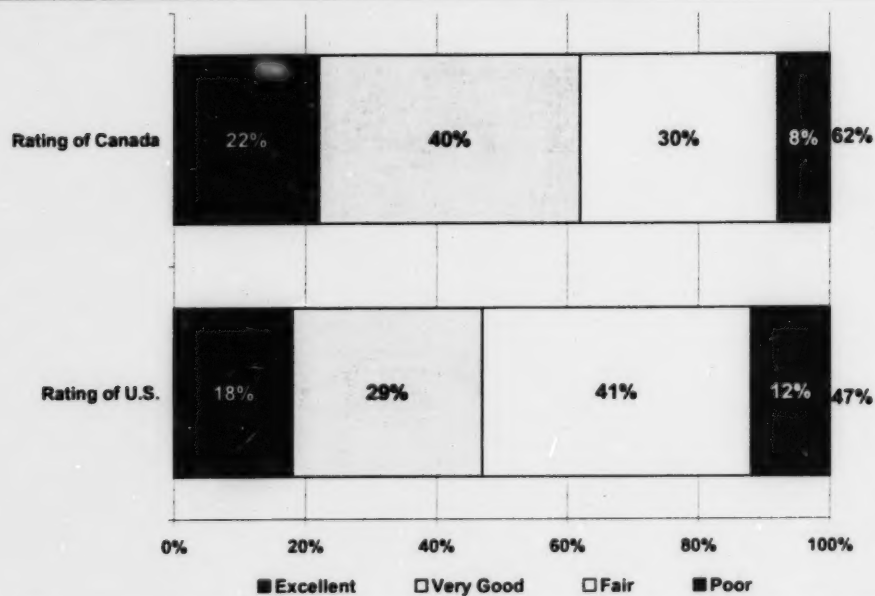
Impression Ratings of the Aboriginal Culture Product Among U.K. Aboriginal Culture Travellers

U.K. Aboriginal Culture travellers' ratings of the Aboriginal Culture product in both Canada and the U.S. are shown below.

U.K. Aboriginal Culture travellers rated the Aboriginal Culture Product in Canada slightly better than that in the U.S.

For Canada, 22% rated the Canadian Aboriginal Culture product as excellent, and a further 40% rated it as very good, for a total of 62%. This rating bodes well for Canada's ability to sell to this segment.

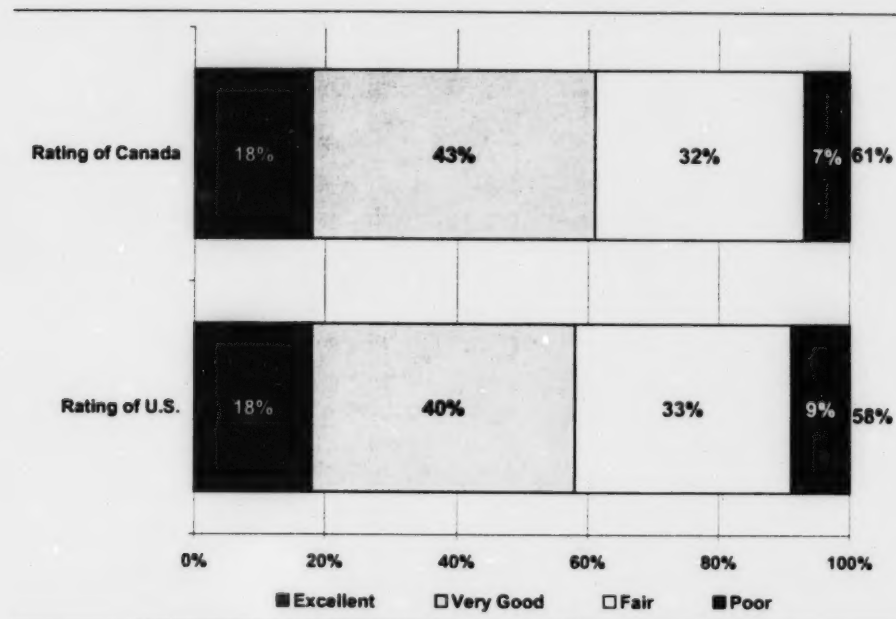
In contrast, only 47% of Aboriginal Culture travellers rated the U.S. Aboriginal Culture product as excellent or very good (18% + 29%).



Impression Ratings of the Aboriginal Culture Product Among German Consumers

As seen in the exhibit below, just over 60% of long-haul German pleasure travellers rated "unique or different aboriginal or indigenous peoples" in Canada as excellent or very good.

These travellers rated the aboriginal product in the U.S. almost identically with 18% having rated it as excellent and 40% as very good, for a total of 58%.

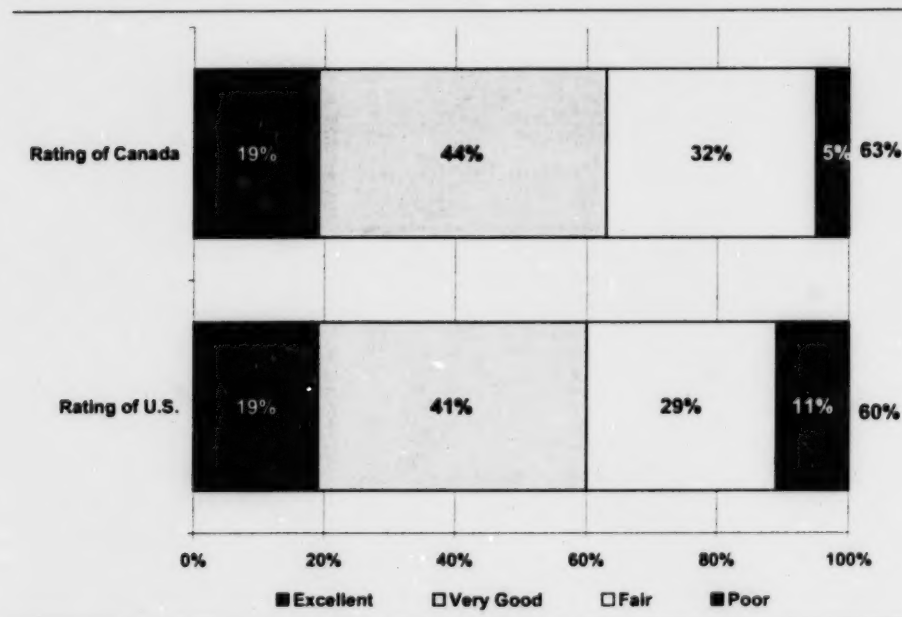


Impression Ratings of the Aboriginal Culture Product Among German Aboriginal Culture Travellers

The exhibit below shows how German Aboriginal Culture travellers rated the Aboriginal Culture product in both Canada and the U.S.

Nineteen percent (19%) of German Aboriginal Culture travellers rated Canada's Aboriginal Culture Product as excellent, and a further 44% rated it as very good, for a total of 63%. Again, this shows the potential of this product for Canada.

The results are similar for the U.S. with 60% of Aboriginal Culture travellers who rated the U.S. Aboriginal Culture product as excellent or very good (19% + 41%).



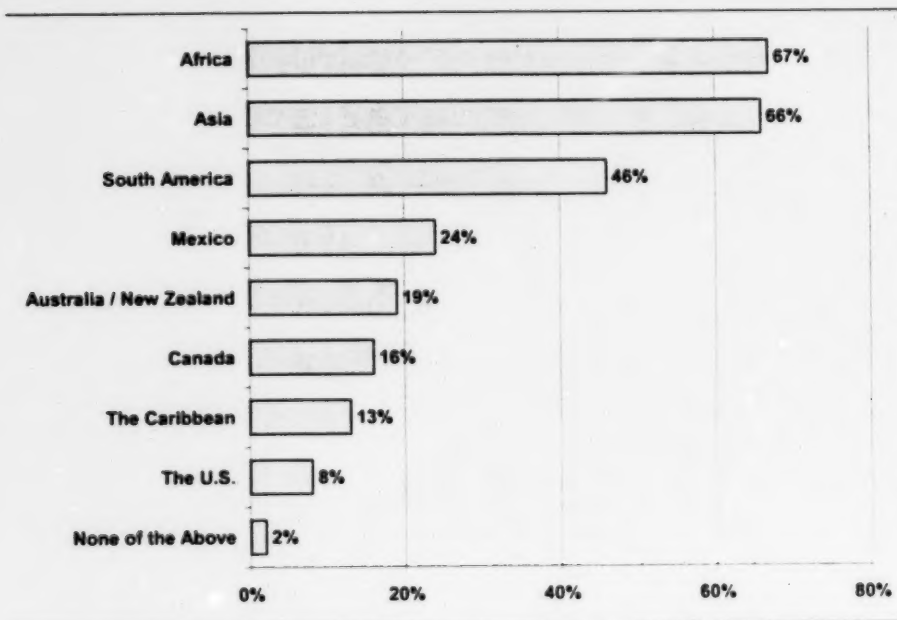
Competitive Positioning of the Aboriginal Culture Product for French Consumers

In the 1998 France Strategic Segmentation Study, French consumers were asked to indicate the best three destinations for a series of attributes.

The exhibit shows the top three destinations mentioned by the French Aboriginal Culture segment for having the opportunity to see or experience unique aboriginal or native groups.

These travellers think of Africa, Asia and South America as the best places to visit for this type of activity.

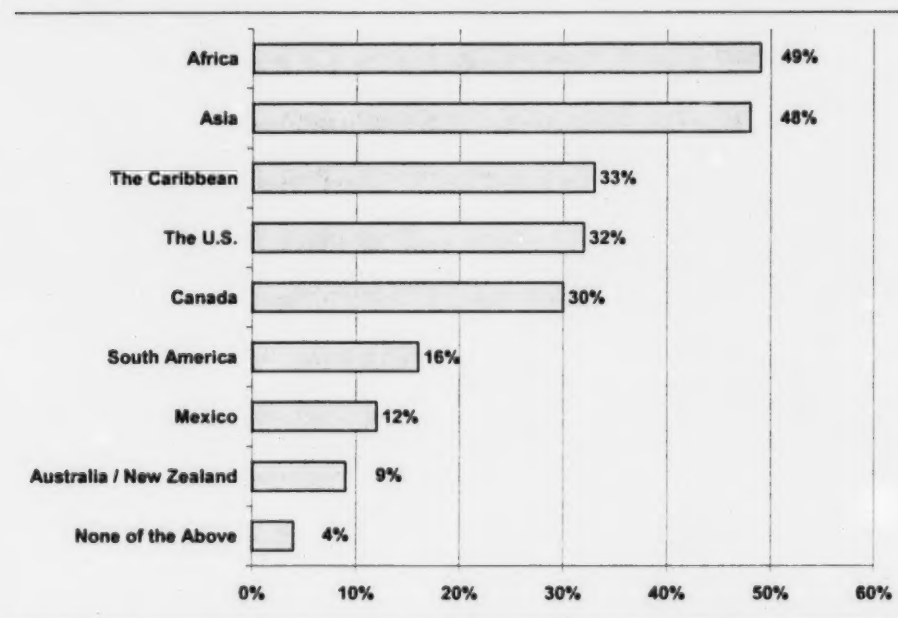
Canada ranks 6th among 8 destination choices at 16%. This represents a marketing challenge for Canada. It needs to improve perceptions if it wants to take advantage of the opportunity.



Destinations Ever Visited by French Aboriginal Culture Travellers

The exhibit shows that French Aboriginal Culture travellers were more likely to have ever visited Africa (49%) and Asia (48%) compared to other long-haul destinations.

Canada ranks 5th out of 8 destinations, with 30% of French Aboriginal Culture travellers having visited at some point in the past.



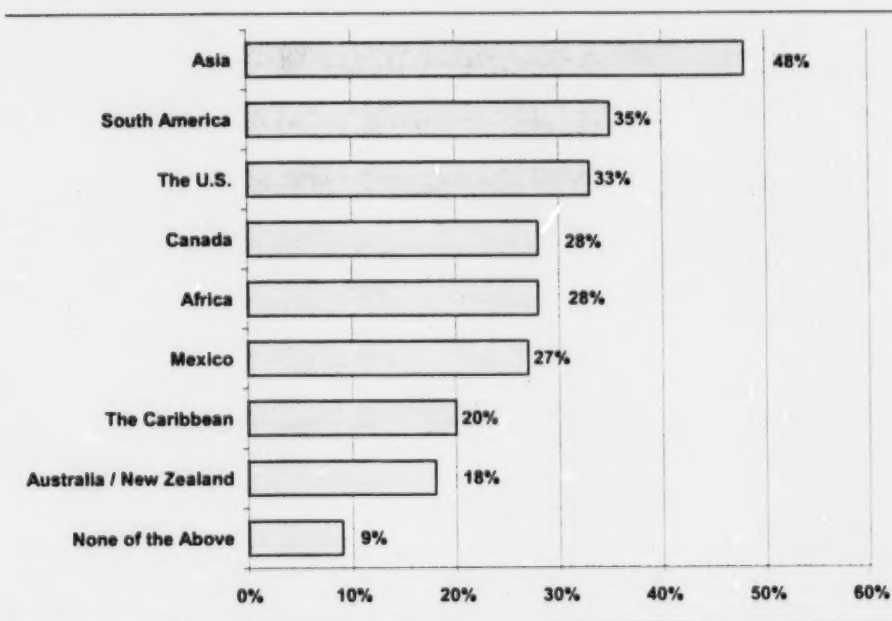
Destinations French Aboriginal Culture Travellers are Interested in Visiting

Asia is by far the destination that French Aboriginal Culture travellers are most interested in visiting in the next three years (48%).

South America and the U.S. are also popular future destinations, each being mentioned by a third of the market (35% and 33%, respectively).

Canada is tied with Africa as the 4th top destination interested in visiting in the next three years (both at 28%), and is followed closely by Mexico at 27%.

Canada's rank in interest is much higher than its rank as a perceived Aboriginal Culture destination. This suggests that there is an opportunity for marketers to sell Aboriginal Culture products as an add on to another type of trip.



PRIMARY MARKETS – DEFINING CHARACTERISTICS OF ABORIGINAL CULTURE TRAVELLERS

Defining Characteristics of Aboriginal Culture Travellers

The purpose of this analysis was to identify key variables that help to distinguish between Aboriginal Culture travellers and other travellers in each of the *primary* European markets.

To identify these attributes, data from the three primary markets was re-analyzed using discriminant analysis. The dependent and independent variables were as follows:

- *Dependent Variable:* The dependent variable in discriminant analysis is the one you are trying to predict. In this case it was the Aboriginal Culture segment variable which defined those in the segment (i.e., Aboriginal Culture Travellers) versus those who are not (i.e., "Others").
- *Independent Variables:* These variables are potential predictors of segment membership. Only "actionable" variables were included. More specifically, demographics, media habits, travel information sources and package use were tested. For the French market, interest in future trip types was also included.

While the ultimate goal is to have 100% correct prediction of group membership (i.e., Aboriginal Culture Travellers vs. Others), this rarely occurs. By comparing predicted groups resulting from the discriminant analysis to actual groups, four groups are created:

- *True Aboriginal Culture Travellers* are travellers in the Aboriginal Culture segment that were correctly classified as such.
- *True Other Travellers* are travellers in the Others segment that were correctly classified as such
- *Potential Aboriginal Culture Travellers* are travellers in the Others segment that were misclassified by the model as Aboriginal Culture travellers. These travellers have the correct profile to be Aboriginal Culture travellers, but did not experience aboriginal culture on their most recent trip. They represent a potential opportunity for this product.
- *Potential Other Travellers* are travellers in the Aboriginal Culture segment that were misclassified as Others. They do not have the correct profile to be Aboriginal Culture travellers, but did experience the product on their most recent trip. The model suggests that they do not generally seek this experience but rather happened on it during their trip, purchased a package that happened to include aboriginal activities, or were travelling with someone who is an Aboriginal Culture traveller.

The analysis for each market shows the proportion of cases classified in each of these four groups.

As mentioned earlier, the purpose of the discriminant analysis is to identify the key factors that contribute to the likelihood of group membership. The characteristics that fall out of the analysis represent ways in which to target Aboriginal Culture travellers.

Factors that fall out of the model fall into two key categories, those that influence membership and that influence non-membership.

The key groups of factors and how they can be used to target the segment are:

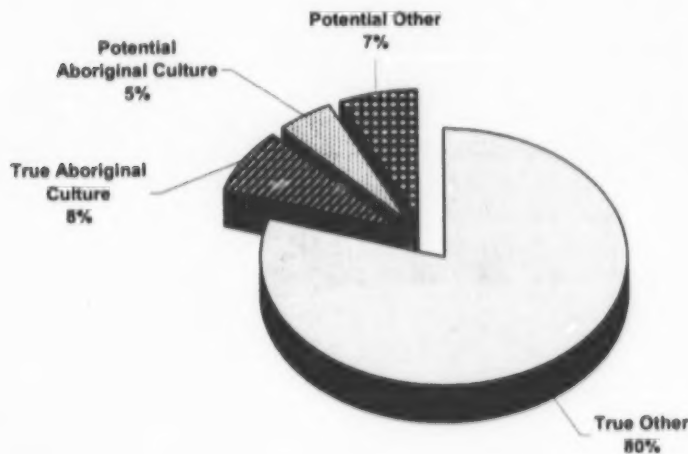
- **Demographics:** These variables identify socio-demographics that distinguish between Aboriginal Culture Travellers and other travellers and can be used to appropriately tailor messages and products to suit Aboriginal Culture travellers. For example, if a predicting factor is "retired", then off-season products may be successful for this segment.
- **Media:** Those media that predict membership in the Aboriginal Culture group are the ones that should be used to sell the product to this segment. Similarly, those that predict membership in the "other" group are ones that should be avoided when targeting this segment.
- **Travel Characteristics:** Distinguishing travel characteristics can be used to help tailor products for the Aboriginal Culture segment. For example, if being a "package traveller" predicts group membership, then aboriginal culture products might be successfully sold through packages.

Classification Results - France

Overall Prediction: The discriminant analysis for France produced a model that correctly classified 88% of respondents. This is exceptionally high for a classification model.

Aboriginal Culture Segment Prediction: The correct prediction of Aboriginal Culture travellers was also quite high at 53%.

The chart below summarizes the results of the classification.



Demographic Determinants of Segment Membership – France

More Likely to be an Aboriginal Culture Traveller Less Likely to be an Aboriginal Culture Traveller	
Demographic Factors	
• Older • Male • Single • White-collar worker • Blue-collar worker • Self-employed / Freelancer • Retired	• Divorced / separated / widowed • Female

Travel Characteristic Determinants of Segment Membership – France

More Likely to be an Aboriginal Culture Traveller	Less Likely to be an Aboriginal Culture Traveller
Interest in Future Trip Type	
• A culture, history or heritage trip • A summer sports trip • A touring trip to a number of destinations • A trip to experience native cultures • A winter sports trip	• A beach resort trip • A trip to a big city • A trip to a theme or amusement park
Traveller Characteristics	
• Package Travellers (travel philosophy) • Took a package tour	
Information Sources Used	
• Books / went to the library • Clubs / associations • Television, newspaper or magazine advertisements • Information received in the mail • On-line services • Travel guides • Picked up brochures / pamphlets • Talked to friends / family members • Talked to business colleagues • Airline • Read articles in newspapers / magazines • Movies / TV shows • None	• Talked to a travel agent • Automobile association • Government tourism office / board • Travel programs

Media Determinants of Segment Membership – France

More Likely to be an Aboriginal Culture Traveller	Less Likely to be an Aboriginal Culture Traveller
Television Stations Watched	
• M6	• TF1 • France 2 • LaCinguieme / Arte • Do not watch television
Types of Television Shows Watched	
• Music television • Soap operas • Educational / cultural shows	• Talk shows • Drama • Situational comedies • Game shows
Radio Stations Listened To	
• France Info • France Culture • Cherie FM	• RTL • Fun Radio • RFM • Europe 2 • France Inter
Other Media	
	• Have a personal computer
Interest in Future Trip Type	
• A culture, history or heritage trip • A summer sports trip • A touring trip to a number of destinations • A trip to experience native cultures • A winter sports trip	• A beach resort trip • A trip to a big city • A trip to a theme or amusement park
Traveller Characteristics	
• Package Travellers (travel philosophy) • Took a package tour	

Demand for Aboriginal Culture Products in Key European Markets

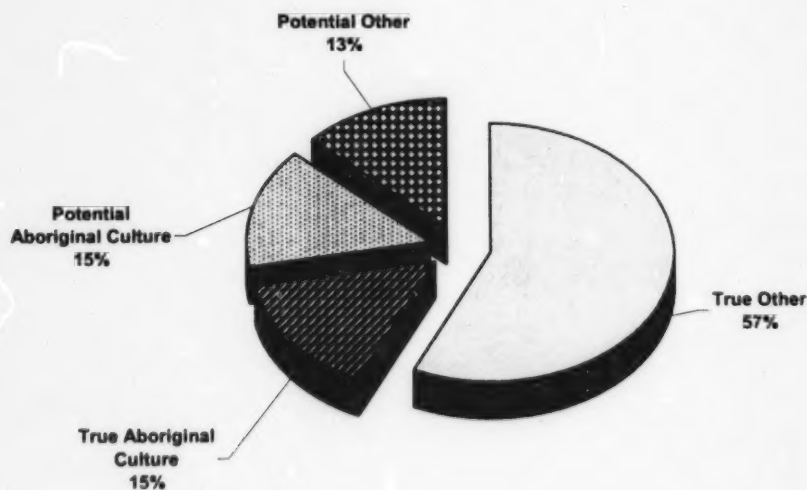
More Likely to be an Aboriginal Culture Traveller	Less Likely to be an Aboriginal Culture Traveller
Information Sources Used	
• Books / went to the library • Clubs / associations • Television, newspaper or magazine advertisements • Information received in the mail • On-line services • Travel guides • Picked up brochures / pamphlets • Talked to friends / family members • Talked to business colleagues • Airline • Read articles in newspapers / magazines • Movies / TV shows • None	• Talked to a travel agent • Automobile association • Government tourism office / board • Travel programs
Newspapers	
• Le Monde • La voix du Nord • Le Courier Picard • Le Dauphine Libere • La Montagne • Ouest France • Presse Ocean • Le Parisien	• Le Journal du Dimanche • Nord Clair • L'Est Republicain • La Liberte de l'Est • La Marseillaise • Liberation • L'Echo du Centre • L'Independent • La Depeche du Midi • France Soir • La Tribune • L'Humanite
Magazines	
• Business / Economics / Finance • Travel • Food / Wine • Television / Radio • Gardening • L'Evenement du Jeudi • Paris Match • VSD	• Decor / Lifestyle • Men's • Automobile / Motorcycling • Sports • Religion • Hunting / Fishing • Le Nouvel Observateur

Classification Results – UK

Overall Prediction: The discriminant analysis for the UK produced a model that correctly classified 72% of respondents.

Aboriginal Culture Segment Prediction: The correct prediction of Aboriginal Culture travellers was 51%.

The chart below summarizes the results of the classification.



Demographic and Travel Characteristic Determinants of Segment Membership – UK

More Likely to be an Aboriginal Culture Traveller		Less Likely to be an Aboriginal Culture Traveller	
Demographic Factors			
• Living together • Divorced/separated/widowed • Higher education		• Blue-collar worker • Administrator/Manager • Unemployed/non-working housewife/retired	
Traveller Characteristics			
		• Package Travellers (travel philosophy) • Took a package tour	
Information Sources Used			
• Talked to a travel agent • Automobile association • Government tourism office\board • Advertisements • Picked up brochures\pamphlets • Tour operator\company • Books\went to the library • None		• Business colleagues • Movies/TV shows	

Media Determinants of Segment Membership – UK

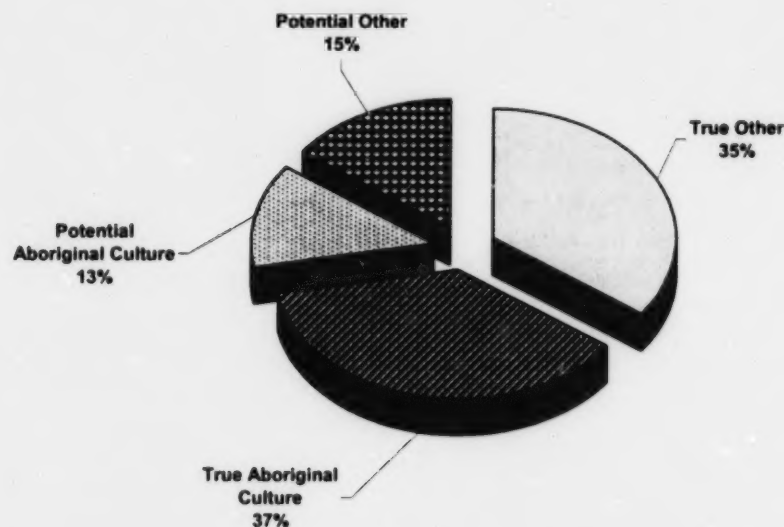
More Likely to be an Aboriginal Culture Traveller	Less Likely to be an Aboriginal Culture Traveller
Television Stations Watched	
• Cable • Sky One	• Sky Movies • Eurochannel • CNN • Sky Sports
Types of Television Shows Watched	
• Commercials • Sports • Drama • Educational/cultural shows • Game shows	• Music television • Soap operas • Situational comedies
Radio Stations Listened To	
• BBC Radio 1 • Commercial Local radio • Heart FM • Jazz FM • BBC Radio 2 • Radio Scotland • BBC Radio 4 • BBC Radio 5 Live • Virgin Radio • Do not listen	• Atlantic 252 • Capital Radio • Essex Radio • Severn Sound • BBC Radio 3 • Talk Radio UK
Newspapers	
• The Sun • The Independent • Financial Times • Sunday Mirror • The People • The Mail on Sunday • Sunday Mail • Do not read any daily newspapers	• News of the World • Sunday Post • Daily Mirror • Sunday Telegraph • The Independent on Sunday • The Observer • Regional newspapers • Daily Mail
Magazines	
• General Interest • Home/Garden • Television/Radio • Specialist • Men's Magazines • Boats/Diving • Hobbies • Music	• Computer

Classification Results – Germany

Overall Prediction: The discriminant analysis for Germany produced a model that correctly classified 72% of respondents.

Aboriginal Culture Segment Prediction: The correct prediction of Aboriginal Culture travellers was extremely high at 74%.

The chart below summarizes the results of the classification.



Demographic Determinants of Segment Membership – Germany

Demographic Factors	
More Likely to be an Aboriginal Culture Traveller	Less Likely to be an Aboriginal Culture Traveller
• Older • Living together • University student • Clerk • White-collar worker • Blue-collar worker • Administrator/manager • Self-employed	• Higher education • Higher income • Single • Teacher • Specialist/freelancer • Medical care giver

Travel Characteristic Determinants of Segment Membership – Germany

More Likely to be an Aboriginal Culture Traveller		Less Likely to be an Aboriginal Culture Traveller	
Traveller Characteristics			
		• Reluctant Travellers	
Information Sources Used			
• Automobile association		• Talked to a travel agent	
• Government tourism office/board		• Travel programs	
• Advertisements		• None	
• Business colleagues			
• Earlier visits			
• Picked up brochures/pamphlets			
• Talked to friends/family members			
• Airline			
• Tour operator/company			
• Movies/TV shows			
Television Stations Watched			
• WDR		• ARD	• ORF 1
• ARTE		• KABEL 1	• RTL
• HR		• VOX	• ORF 2
		• VH 1	• Eurosport
		• LOKALSENDE R	• SAT 1
		• English station	• PRO 7
		• NDR	• VIVA
		• ZDF	• NTV
		• MTV	• MDR
Types of Television Shows Watched			
• News		• Soap operas	
• Music television		• Educational/cultural shows	
• Sports			
• Talk shows			
• Game shows			
Radio Stations Listened To			
• Rias Berlin		• HR	
• Antenne Das Radio		• Radio RTL	
• Radio Hamburg		• Radio Rhein Ruhr	
• Radio Bremen		• NDR	
• Radio NRW		• Radio Mecklenburg Vorpommern	
• SDR 3, 1, 4		• Radio Gong	
• Antenne 1		• Antenne Düsseldorf	

Demand for Aboriginal Culture Products in Key European Markets

More Likely to be an Aboriginal Culture Traveller	Less Likely to be an Aboriginal Culture Traveller
• Energie Radio • SWF • 1 Live • BR • Klassikradio • WDR • Antenne Thüringen • MDR • 100,6 • FFH	• SR • Do not listen to radio
Newspapers	
• Rheinischer Merkur • Welt am Sonntag • Hamburger Abendblatt • Die Zeit • Handelsblatt • Die Woche • Do not read any daily papers	• Waz • Die Welt • Rheinische Post • Frankfurter Rundschau • Other regional papers
Magazines	
• Fit for Fun • Elle • Hörzu • Freundin • Geo • TV-Spielfilm • Bunte • Vogue • Focus • Stern • Bild der Frau • PC-Player • Brigitte • Other sports magazines • Other advisor magazines • Do not read magazines/periodicals	• TV-Today • Travel brochures/magazines in general • Tina • Spiegel • Sport Bild • Kapital • ADAC • Schöner Wohnen • Other women's magazines • Other sex magazines

SECONDARY MARKETS – SIZE OF THE ABORIGINAL CULTURE TRAVEL MARKET

Size of the Long-Haul Pleasure Travel Market for Secondary European Markets

In order to determine the size of the Aboriginal Culture travel market in each of the three secondary markets (the Netherlands, Italy and Switzerland), questions were added to existing omnibus surveys that were conducted in February 2000 in these three markets.

The table below shows the approximate size of the adult population, the incidence of long-haul pleasure travel and the size of the potential long-haul pleasure travel market for the secondary European markets.

Of the secondary markets, Italy has the largest potential market (9.3 million long-haul travellers), followed by the Netherlands (5.0 million travellers) and then Switzerland (2.5 million travellers).

	Netherlands	Italy	Switzerland
Omnibus sample			
# of people interviewed	1,008	1,002	1,024
Approximate Adult Population			
# of people (000s)	12,772	37,906	5,200
Incidence of Long-Haul Pleasure Travel			
Taken a trip in the past three years or planning to in the next two years	39.1%	24.5%	47.9%
Potential Adult Long-Haul Pleasure Travellers			
# of travellers (000s)	4,994	9,287	2,491

Overall Demand for Aboriginal Culture Products for Secondary European Markets

The exhibit below shows the overall demand for Aboriginal Culture products in the secondary European markets including the percentage who participated in Aboriginal Culture activities on their most recent trip and the percentage who are motivated by Aboriginal Culture in destination selection.

Italian long-haul pleasure travellers were the most likely to have participated in Aboriginal Culture activities on their most recent trip (53%) and are also the most likely to be motivated by Aboriginal Culture in selecting a vacation destination (71%), compared to their counterparts in the Netherlands and Switzerland.

	Netherlands	Italy	Switzerland
Participated in Aboriginal Culture Activities			
% participated in on most recent trip	35%	53%	45%
Motivated by Aboriginal Culture in destination selection			
% always + often important	40%	71%	57%

Size of the Aboriginal Culture Market for Secondary European Markets

The table below presents the size of the potential Aboriginal Culture market in each of the three secondary markets.

Italy has the largest number of potential long-haul Aboriginal Culture travellers among the three secondary markets at 4.9 million travellers.

Although travellers from the Netherlands placed the lowest importance on Aboriginal Culture products in destination selection among the three secondary markets, the potential of 1.7 million Aboriginal Culture travellers is still sizeable due to the sheer size of the long-haul travel market.

	Netherlands	Italy	Switzerland
Potential Adult Long-Haul Pleasure Travellers			
(000s)	4,994	9,287	2,491
Size of the Potential Aboriginal Culture Market			
# of travellers (000s)	1,748	4,922	1,121

Size of the Aboriginal Culture Market to Canada for Secondary European Markets

Presented below is the demand for Aboriginal Culture products in Canada including the interest in visiting Canada among Aboriginal Culture travellers in each country and the size of the potential market to Canada.

In terms of size, Italian Aboriginal Culture travellers represent the largest potential market to Canada among the three secondary markets (3.1 million potential travellers). The size of the Aboriginal Culture market is under one million in each of the other two markets.

	Netherlands	Italy	Switzerland
Size of the Potential Aboriginal Culture Market			
# of travellers (000s)	1,748	4,922	1,121
Interest in Visiting Canada			
(5 years)	53%	62%	63%
Potential Aboriginal Culture Travellers to Canada			
(000s)	926	3,052	706

SECONDARY MARKETS – SOCIO-DEMOGRAPHIC CHARACTERISTICS

Socio-Demographic Characteristics – The Netherlands

As seen on the next page, Aboriginal Culture travellers from the Netherlands are, on average, 39 years of age, and are more likely to be male (54%) than female (46%).

Just over two thirds of Dutch Aboriginal Culture travellers reside in the West (36%) and a fifth lives in the East (21%). Sixteen percent (16%) live in one of the three major cities in the Netherlands - Amsterdam, Rotterdam and the Hague.

One fifth of Aboriginal Culture travellers live alone (19%) and 12% hold a university degree.

Dutch Aboriginal Culture travellers have higher household incomes compared to the Dutch long-haul travel market overall. In fact, only 14% have household incomes that are lower than the national median (\$Cdn 36,000) versus 30% of the overall Dutch long-haul travel market.

Interestingly, there is very little difference between Dutch Aboriginal Culture travellers and the long-haul travel market in general.

Demand for Aboriginal Culture Products in Key European Markets

	Dutch Aboriginal Culture Travellers	Overall Dutch Travel Market
Sample Size		
• (n=)	104	353
Gender		
• Male	54%	53%
• Female	46%	47%
Average Age		
• Mean Age	39	42
• Median Age	36	38
Area (Nielson)		
• Large Cities: Amsterdam, Rotterdam, Hague	16%	14%
• West	36%	34%
• North	10%	7%
• East	21%	20%
• South	17%	25%
Household Income		
• Less than Dfl. 50,000	14%	30%
• Dfl. 50,000 to 75,000	23%	16%
• More than Dfl. 75,000	63%	54%
Number of People in the Household		
• One	19%	19%
• Two	45%	43%
• Three	17%	15%
• Four	11%	15%
• Five or more	8%	8%
Level of Education		
• Lower education	4%	8%
• Lower business education	10%	12%
• Medium education	10%	9%
• Medium business education	35%	33%
• Higher education	9%	7%
• Higher business education	20%	19%
• University	12%	12%

Socio-Demographic Characteristics – Italy

Almost one third (32%) of Italian Aboriginal Culture travellers reside in North Western Italy, while 19% reside in North Eastern Italy. A further 30% live in Central Italy, with the remaining 19% calling Southern Italy and the Isles home.

Just over a third (35%) of Aboriginal Culture travellers in Italy live in small cities (10,000 inhabitants or less), and 23% live in large cities of more than 250,000 inhabitants.

Italian Aboriginal Culture travellers are 40 years of age on average, and are equally likely to be male as female.

In terms of occupation, 27% are white collar workers and 18% are self-employed. Fourteen percent (14%) are students and 14% are retired.

Thirteen percent (13%) of Aboriginal Culture travellers in Italy hold a university degree.

Again, there is little difference between Italian Aboriginal Culture travellers and the Italian long-haul travel market as a whole.

Demand for Aboriginal Culture Products in Key European Markets

	Italian Aboriginal Culture Travellers	Overall Italian Travel Market
Sample Size		
• unweighted n	78	167
Area		
• North West	32%	32%
• North East	19%	19%
• Centre	30%	24%
• South & Isles	19%	25%
Size of City		
• 10,000 inhabitants and less	35%	30%
• 10,001 to 30,000 inhabitants	21%	22%
• 30,001 to 100,000 inhabitants	14%	22%
• 100,001 to 250,000 inhabitants	8%	8%
• More than 250,000 inhabitants	23%	18%
Gender		
• Male	51%	51%
• Female	49%	49%
Average Age		
• Mean	40	40
• Median	37	37
Head of the Household		
• Yes	41%	43%
Education Level		
• No education	0%	1%
• Elementary school	5%	3%
• Primary school	22%	23%
• Secondary school / college	60%	58%
• University degree	13%	16%
Profession		
• Self-employed in private enterprise / trade	18%	18%
• White collar / employee / teacher	27%	31%
• Tradesman	12%	7%
• Worker / blue collar	4%	4%
• Housewife	9%	13%
• Student	14%	11%
• Retired	14%	11%
• Unemployed	3%	5%

Socio-Demographic Characteristics – Switzerland

Swiss Aboriginal Culture travellers are equally likely to be male or female, and are, on average, 42 years of age.

Almost a fifth (18%) hold a university, a technical university or a Swiss Hochschule degree.

Fifty-nine percent (59%) are employed full time, 17% are employed part time, with the remaining 24% not being employed at all.

A fifth (20%) of Aboriginal Culture travellers in Switzerland live alone.

It is interesting to note that 9% have young children (under 5) in the household.

One quarter of Aboriginal Culture travellers (24%) have annual household incomes of more than SFr. 108,000 (approximately CDN\$100,000).

Differences between Swiss Aboriginal Culture travellers and long-haul pleasure travellers are minimal.

	Swiss Aboriginal Culture Travellers	Overall Swiss Travel Market
Sample Size		
• unweighted n	183	446
Gender		
• Male	49%	52%
• Female	51%	49%
Average Age		
• Mean Age	42	40
• Median Age	40	37
Manager of the Household		
• Single	48%	41%
• Together with someone else	34%	36%
• Someone else	19%	23%
Level of Education		
• Primary school	3%	3%
• Secondary school	9%	11%
• Vocational school	54%	53%
• Medium school	7%	6%
• Teachers seminar, higher technical school	10%	11%
• University, technical university, Swiss Hochschule	18%	17%

Demand for Aboriginal Culture Products in Key European Markets

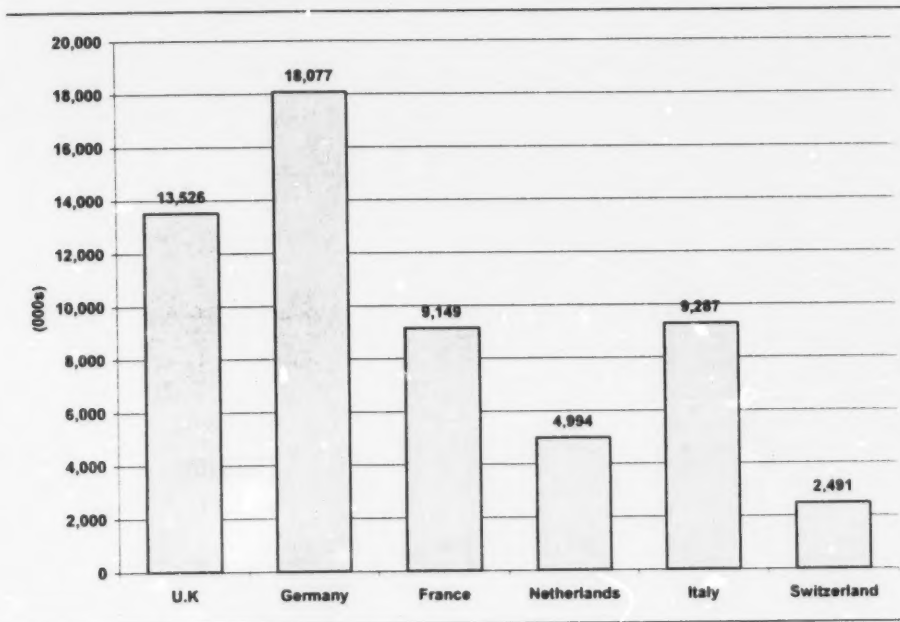
	Swiss Aboriginal Culture Travellers	Overall Swiss Travel Market
Occupation of Respondent		
• Owner of a company and liberal professions	2%	3%
• Self employed	8%	8%
• Managing employee / official	16%	14%
• Other employees / officials / representatives	41%	38%
• Skilled labourer	7%	7%
• Unskilled labourer	2%	2%
• Student / Pupil	7%	10%
• Housewife/ houseman	7%	7%
• Not employed	1%	1%
• Unemployed	1%	1%
• Retired	9%	9%
Level of Employment		
• Full employed	59%	58%
• Partly employed	17%	17%
• Not employed	24%	25%
Monthly Household Income		
• Less than 3,000 SFr.	3%	2%
• SFr. 3,000 to 6,000	37%	37%
• SFr. 6,001 to 9,000	35%	35%
• More than 9,000 SFr.	24%	27%
Size of Household		
• One	20%	17%
• Two	42%	37%
• Three	17%	19%
• Four	16%	20%
• Five or more	5%	7%
Have children / youths under 20 in household		
• Have children 0 to 5 years of age	9%	13%
• Have children 6 to 9 years of age	10%	10%
• Have children 10 to 14 years of age	11%	12%
• Have youths 15 to 19 years of age	12%	14%

THE ABORIGINAL CULTURE MARKET – POTENTIAL FOR CANADA

Size of the Potential Long-Haul Pleasure Travel Market

The exhibit below summarizes the size of the long-haul pleasure travel market for both the primary and secondary European markets.

Germany and the U.K. clearly offer the largest number of potential long-haul pleasure travellers, followed by Italy and France.

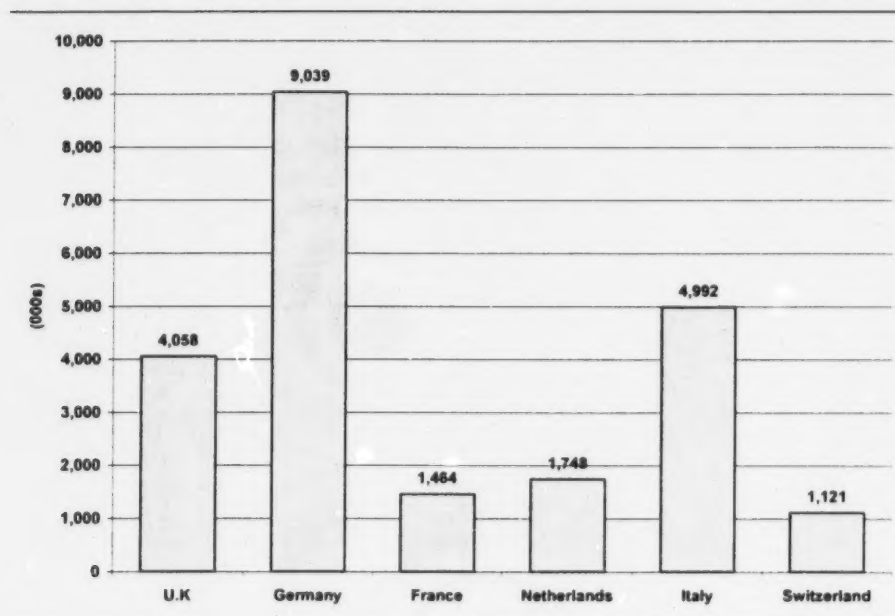


Size of the Potential Aboriginal Culture Travel Market

The size of the potential Aboriginal Culture travel market for both the primary and secondary European markets is shown below.

Germany offers, by far, the greatest number of potential long-haul Aboriginal Culture travellers of the markets surveyed with 9.0 million potential travellers looking for Aboriginal Culture experiences.

Italy and the U.K. also offer considerable potential at 5.0 million and 4.1 million potential travellers, respectively.

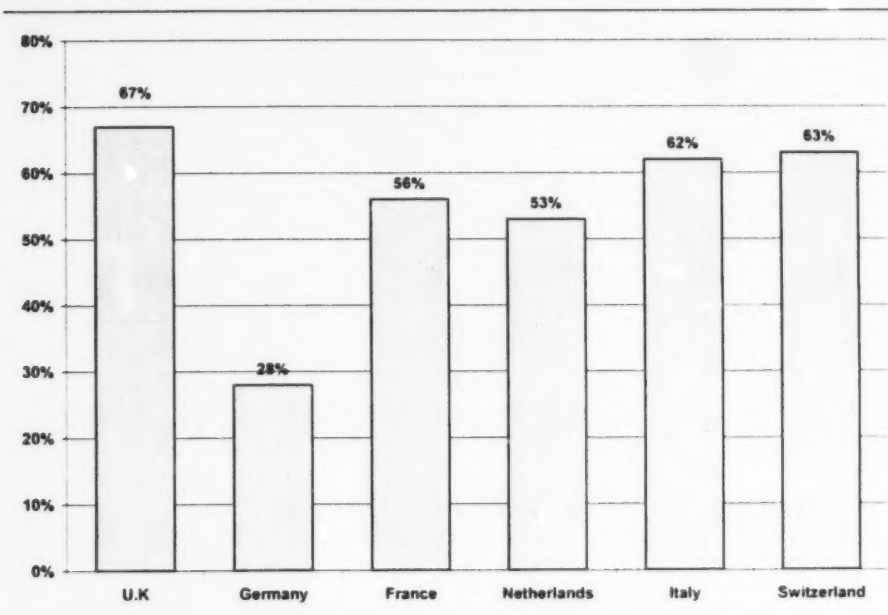


Interest Among Aboriginal Culture Travellers in Visiting Canada in the Next Five Years

Interest among Aboriginal Culture travellers in each market in visiting Canada in the next five years is illustrated below.

With the exception of Germany, the European markets all show strong interest in visiting Canada ranging from 53% to 67%.

Market interest is much lower in Germany (28%) presenting a marketing challenge for suppliers of Canadian Aboriginal Culture products.

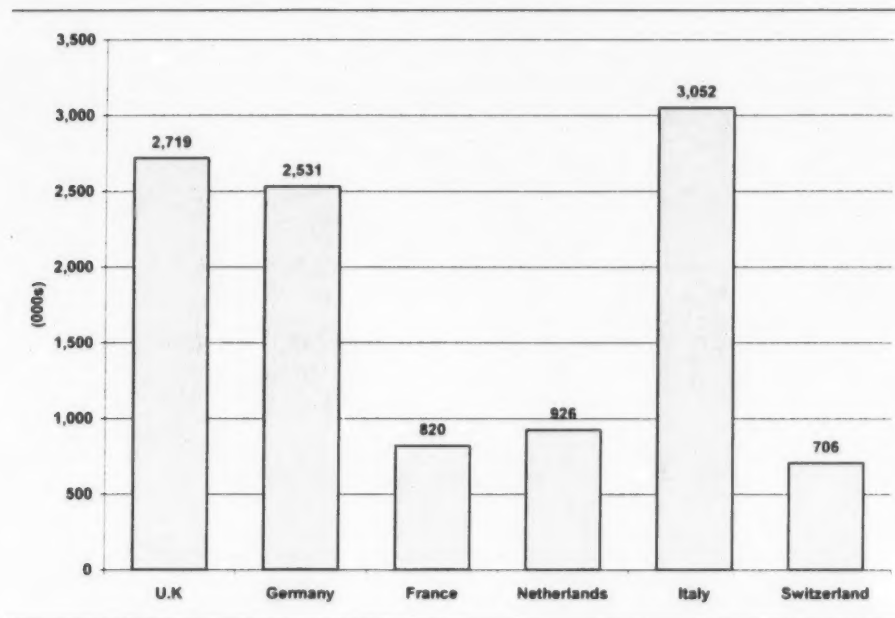


Size of the Potential Aboriginal Culture Travel Market to Canada

Presented below is the size of the potential Aboriginal Culture market to Canada among the primary and secondary European markets.

The Italian market offers the best potential for Canada (3.1 million potential travellers).

The U.K. and German markets also show strong potential, with 2.7 million and 2.5 million potential Aboriginal Culture travellers to Canada, respectively.



The Aboriginal Culture Market - Potential for Canada

In summary

- The Italian, U.K. and German markets hold the strongest potential for attracting Aboriginal Culture travellers to Canada. Together, they could potentially account for 8.3 million Aboriginal Culture travellers to this country over the next five years.
- Germany may represent a challenge for marketers of Canadian Aboriginal Culture products with only 28% interested in visiting Canada in the next five years. Initiatives need to be taken to boost interest levels so that Canada can fully realize the considerable potential in this market.
- Further quantitative study of the Italian market is recommended due to the lack of consumer information on this key market for Aboriginal Culture products.
- For all three of the top markets identified (Italy, the U.K. and Germany), further study is recommended through focus groups with Aboriginal Culture travellers and/or in-depth interviews with the travel trade to obtain insights into appropriate product development and marketing strategies.